

Case Study

**Oxmoor Valley, Alabama: New Urbanism Arises in
Birmingham**

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Overview Oxmoor Valley, Alabama: New Urbanism Arises in Birmingham

Less than 20 years ago, Oxmoor Valley was a wild pasture located just southwest of Birmingham between Red Mountain and Shades Mountain. Today, it is a 7,800-acre mixed-use community that houses a fully occupied light industrial park, the Robert Trent Jones Golf Complex and the University of Alabama at Birmingham-based research and development park for high-tech companies. Oxmoor is composed of land within the cities of Birmingham, Bessemer, and Homewood in Jefferson County.

During the 1980s, the City of Birmingham partnered with the Metropolitan Development Board, City of Bessemer, Jefferson County, University of Alabama at Birmingham and property owners of the land now known as Oxmoor Valley. Birmingham's key goal initially was economic development retention (e.g., Bruno's, Inc., Parisian). As market demand for land in Birmingham grew, the partners realized the greater economic development potential in the thousands of acres of undeveloped land located five miles from the city center.

Embracing the concepts of New Urbanism and master-planned communities, the partners created the Oxmoor Master Plan, a comprehensive plan that called for the mixed-use development of Oxmoor Valley and an integration of living and work places. *[Note: New Urbanism is an innovative planning philosophy that seeks to create pedestrian-friendly and auto-independent urban villages of mixed-uses where individuals can live, work, and play.]*

Conditions Leading to the Practice

In 1982, the City of Birmingham, under the leadership of then-Mayor Richard Arrington, with the Metropolitan Development Board as its marketing agent, began a program for developing industrial parks, purchasing land from U.S. Steel to set aside for four industrial parks. As part of this effort, the Metropolitan Development Board surveyed area businesses about future expansion and relocation plans.

Parisian (now Sak's Inc., department store chain) responded to the survey by indicating an intent to relocate its headquarters and warehouse outside of its Downtown Birmingham location. The Metropolitan Development Board asked Parisian to stay in Birmingham, but could not find a site available within the city. At the same time, Bruno's, Inc. (supermarket chain) was also searching for a site to relocate its headquarters and warehouse operations from downtown

Birmingham. The city did not want to lose the two corporate residents, both significant contributors to its tax base.

The property that Bruno's, Inc. was interested in was owned by Mead Paper Company and technically outside of city limits. However, the property was adjacent to the land set aside for Oxmoor Industrial Park. The city worked with Bruno's in its efforts to purchase the land, with annexation plans in mind. Because Mead Paper Company desired to sell more land than needed by Bruno's (2,500 acres), Vulcan Lands and SONAT purchased the other tracts of land. The city annexed the entire 2,500 acres.

In addition to Bruno's, Inc., the Metropolitan Development Board convinced Parisian to locate on a tract nearby. In 1986, both companies moved to their new sites and were incorporated into Oxmoor Industrial Park. It was at this time that the city, Metropolitan Development Board, and area property owners decided to coordinate their efforts for the future development of Oxmoor.

Organization

Spearheading the development of the Oxmoor Industrial Park, the City of Birmingham has played a leadership role in the development of Oxmoor Valley since 1982. In 1990, the Oxmoor Development Guidelines (see page 5) created the Oxmoor Steering Committee to guide and direct the development of Oxmoor Valley. It is composed of members representing the following organizations.

City of Birmingham
City of Bessemer
Jefferson County
Metropolitan Development Board
University of Alabama at Birmingham
Sand Ridge Neighborhood Association
USX Realty Development
McDonald Investment Company
United Land/Walter Industries
Edward's Land Trust

Voting members of the Oxmoor steering committee are the City of Birmingham, City of Bessemer, Jefferson County, USX Realty Development Company, McDonald Investment Company and University of Alabama at Birmingham. USX Realty Development is by far the largest property owner, with 5,809 acres of undeveloped land. Others are invited in staff or advisory capacity.

Because Alabama counties are responsible for sewer development and Oxmoor Valley did not have an existing sewer infrastructure, Jefferson County agreed to serve on the committee. Both Bessemer and Homewood were invited to join the community, though the latter declined participation.

The Oxmoor Steering Committee is responsible for the development, maintenance, and planning of the area. Since 1990, the committee has met twice

a month to discuss, decide, and fund issues related to planning, infrastructure, utilities, architectural design, and projects in Oxmoor Valley. The committee reviews and revises the Oxmoor Development Guidelines as needed, and in accordance with the Oxmoor Master Plan.

The Oxmoor Steering Committee hired Brantley Visioneering, a private consultant, to serve as Oxmoor Management. Oxmoor Management, responsible for the administrative management of Oxmoor Valley, coordinates the activities of the Oxmoor Steering Committee relative to capital projects. In reviewing site plans for construction planned in the area, its focus is on adhering to the development guidelines established by the committee, as well as on meeting the infrastructure development needs (e.g., roads, utilities) of the area. Oxmoor Management submits site plans that do not conform to the Oxmoor Development Guidelines to the Oxmoor Steering Committee for review and discussion. Oxmoor Management serves as the official record keeper of the Oxmoor Steering Committee.

The Metropolitan Development Board markets the five-county Birmingham metropolitan area for economic development purposes. In this role and as a member of the Oxmoor Steering Committee, the board markets the general Oxmoor Valley area as well as manages the city's Oxmoor Industrial Park. The University of Alabama at Birmingham manages the UAB Research Park at Oxmoor.

The Practice in Operation

The Oxmoor Master Plan

In 1986, the City of Birmingham and Metropolitan Development Board formed a partnership with the property owners of Oxmoor Valley -- Vulcan Lands, SONAT, Edward's Land Trust, and USX Realty Development Company (subsidiary of U.S. Steel) -- to develop and implement a master plan for Oxmoor. The Oxmoor partners hired HOH Associates, Inc., a private consultant, to design a master plan for Oxmoor. The goal of the Oxmoor Master Plan is to create a mixed-use community of commercial, retail, and residential uses that has an internal "village" focus, allowing circulation by vehicle and by a community-wide pedestrian pathway system extending from living to working places.

The Oxmoor Master Plan parcels the 7,800-acre territory into development clusters, primarily of mixed-use. The plan specifies certain types of developments within some of these clusters. The location of Bruno's, Inc. and Parisian at the northern end of Oxmoor Valley fit the objectives of the City of Birmingham to develop the Oxmoor Industrial Park. Therefore, the area for the Oxmoor Industrial Park is designated as the Light Industry cluster. Following is a list of the other developments included in the Oxmoor Master Plan.

- Planned Mixed-Use Employment Cluster: a high-tech research and development corridor, including the UAB Research Park and the USX Corporate Center.
- Planned Mixed-Use Village Center Cluster: a pedestrian-friendly, commercial and retail-oriented urban village, conference and hotel center, and residential mixed-uses
- Planned Mixed-Use Residential Cluster: residential mixed-uses, a golf course and pedestrian pathways
- Throughout Oxmoor Valley, the plan calls for a continuous open-space park system that is connected by pedestrian pathways

Also in 1986, Jefferson County and the City of Birmingham created a new mixed-use zoning overlay district (a.k.a., MXD Zone) that covers all of Oxmoor Valley, with the exception of the Oxmoor Industrial Park, which is governed by its own set of covenants. The purpose of the MXD Zone is to accommodate various activities within one category, ease the development permitting process, and closely regulate the design quality of developments. (Note: In 1999, the City of Bessemer also adopted the mixed-use zoning category for the land in Oxmoor within its boundaries.)

In 1990, the Metropolitan Development Board hired HOH Associates, Inc. to create development guidelines for Oxmoor. The purpose of the Oxmoor Development Guidelines is "to guide the future planning and design of developed areas within Oxmoor" in accordance with the Oxmoor Master Plan. The guidelines pertain to site development, architectural, and landscape standards for private-sector development of residential, commercial, office, research, industrial, and civic or institutional uses. Developers must adhere to the Oxmoor Development Guidelines and the requirements of existing zoning legislation.

The Oxmoor Development Guidelines effectively established the Oxmoor Development Review Board, now known as the Oxmoor Steering Committee, to review site plans from developers, and revise the development guidelines.

Implementing the Master Plan

The Oxmoor partners, many of whom now compose the Oxmoor Steering Committee, implemented three major projects during the late 1980s, in accordance with the Oxmoor Master Plan.

Oxmoor Industrial Park. The Oxmoor Industrial Park is a 425-acre planned industrial district in the northern section of Oxmoor Valley. Several infrastructure developments, funded by the City of Birmingham, have occurred to prepare this park for its tenants:

- (1) Construction of Lakeshore Parkway to connect the park to I-65 in two miles

- (2) Construction of Industrial Lane which runs north to south through a western portion of the park
- (3) Upgrade of Industrial Drive running north to south through the entire park
- (4) Construction of a 4-inch gas line, 12-inch water main, and 15-inch sewer line along Industrial Drive and an 8- to 10-inch sewer line along Industrial Lane

In addition, the Alabama Power Company constructed an electricity transmission line that borders the park on the west.

The Metropolitan Development Board created covenants for the park concerning factors that affect the character of the site -- e.g., building-to-land ratios, proper setbacks from the street, rights-of-way property lines, off-street parking, height requirements, utility easements, landscaping, open space requirements, and architectural and aesthetic standards. The Oxmoor Industrial Park is not part of the mixed-use zoning overlay district, and thus has its own zoning requirements for light industry development.

To ensure that tenants adhere to the covenants, the board created the Architectural Review Committee, composed of five members -- a representative from the Metropolitan Development Board, a representative selected by the Oxmoor Steering Committee, an architect, civil engineer, and existing tenant representative.

The Architectural Review Committee and Birmingham Planning Commission must approve all site development plans before construction can begin in the park. The Metropolitan Development Board has actively marketed Oxmoor Industrial Park to new and expanding businesses through presentations, printed materials, and site visits. The board also assists tenants in their efforts to adhere to the covenants for the park.

Robert Trent Jones Golf Complex. The Metropolitan Development Board suggested the addition of a golf course to the Oxmoor Master Plan in 1987. The board received a commitment from USX Realty Development Company to donate land in Oxmoor for a golf course if the state would fund development.

The Metropolitan Development Board approached the Retirement Systems of Alabama to help fund the golf course development. The latter organization subsequently hired Robert Trent Jones to design a \$15-million golf complex with three golf courses in Oxmoor, as well as seven other similar complexes in Alabama. At the request of the Metropolitan Development Board, Jackson County agreed to develop the appropriate sewer infrastructure.

UAB Research Park. In 1986, the Oxmoor partners began plans to develop a high-tech research-and-development corridor in Oxmoor Valley. The City of Birmingham convinced the Southern Research Institute, a non-profit R&D organization, to build a facility just south of Oxmoor Industrial Park to be the

corridor's anchor. Also, Southern Research Technologies, a for-profit R&D company, built a new facility adjacent to the Southern Research Institute.

In 1994, on the advice of the Oxmoor Steering Committee, the City of Birmingham transferred to the University of Alabama at Birmingham Research Foundation 50 acres of land on the west side of Oxmoor Valley to establish the UAB Research Park at Oxmoor. The agreement allowed the foundation to purchase an additional 50 acres adjacent to that land, resulting in a total of 100 acres to be developed as part of the park.

The strategic proximity of the UAB Research Park to the Southern Research is part of the Oxmoor Master Plan for developing a high-tech R&D corridor. The master plan for the UAB Research Park calls for 25 buildings filled with office and laboratory space on the 100 acres owned by the UAB Research Foundation.

Infrastructure Development. The greatest challenge to implementing the Oxmoor Master Plan has been the lack of infrastructure in Oxmoor Valley. Since 1987, Oxmoor has received more than \$24 million in public transportation funds and \$8 million for sewer and power line construction and relocation, according to the University of Alabama at Birmingham.

Much of the infrastructure development has occurred within and around the Oxmoor Industrial Park. The construction of Lakeshore Parkway, connecting I-65 to the Oxmoor Industrial Park and UAB Research Park, reflects the first two phases of a four-phase project. The next two phases, scheduled for completion in 2000, will connect the UAB Research Park to Bessemer (phase three) and, eventually, to I-459 (phase four).

In addition to phases three and four of the Lakeshore Parkway project, public and private financing has been secured for three other roadway projects underway, each connecting to or in close proximity to Lakeshore Parkway. These projects are coordinated by Oxmoor Management and directed by the Oxmoor Steering Committee.

Outcomes

The Oxmoor Master Plan continues to be a work-in-progress. Approximately 800 (11 percent) of the 7,800 acres in Oxmoor Valley has been or is in the process of being developed. Following are the key outcomes of the Oxmoor Master Plan process, to date.

Oxmoor Industrial Park Fully Occupied. The 425-acre industrial park is fully occupied, reports the Metropolitan Development Board. It continues to be the corporate headquarters location for Bruno's, Inc. and Parisians, now known as Saks, Inc. With over 2.5 million square feet of light-industrial, distribution, and office space, the park is occupied by more than 40 businesses that account for approximately 4,000 jobs.

Robert Trent Jones Golf Complex Built. USX Realty Development Company donated 510 acres to the Retirement Systems of Alabama for the golf complex. In 1992, the Robert Trent Jones Golf Complex at Oxmoor opened with 54 holes (three 18-hole courses). The Oxmoor complex, the first of eight such complexes to open in Alabama, is part of the state's Robert Trent Jones Trail. An estimated 95,000 rounds of golf are played at Oxmoor per year.

UAB Research Park Houses Anchor Tenant. In 1997, the Office for the Advancement of Developing Industries (OADI) Technology Center became the park's first tenant, relocating from the University of Alabama at Birmingham's downtown campus, and is considered to the park's anchor. The OADI Technology Center, formerly known as the Genesis Center, houses the UAB Incubator Program for biotechnology and advanced technology companies. The center's new 67,735-square-foot building allows space for 20 laboratories and 20 offices.

Since 1983, OADI has assisted in the formation of 56 new tenant companies and several associate companies, and its incubator has graduated 31 companies. Currently housing 16 companies, OADI expects its new location can serve the needs of 40 tenant companies. NexGen Health Systems, a software developer specializing in disease management applications, was the first to graduate from OADI at its new location in April 1998. In 1999, the UAB Research Park attracted its first for-profit tenant -- PCS Health Services. The company is currently constructing a mail-order pharmacy facility on-site.

Oxmoor Village Conceptual Master Plan Unveiled. In 1998, the Oxmoor Steering Committee finalized development plans for the 144-acre Oxmoor Village, located in the center of Oxmoor Valley. The two-story Oxmoor Village Center, totaling 368,615 square feet, will have approximately 53.8 percent of its space dedicated to retail, 25.4 percent dedicated to office and 20.8 percent dedicated to apartments. The Oxmoor Convention and Hotel Center, adjacent to the Village Center, will be sited on approximately 23 acres. Two-story village apartments will add more than 400 units to the area, as well as include more than 45,000 square feet of office and retail space. Other residential uses planned for Oxmoor Village include two-story cottage apartments, a two-story condominium, 51 town home lots, and 85 cottage lots.

Conclusion

The once remote area of Oxmoor Valley is now the setting for a master-planned, mixed-use community. One of the innovative aspects of this practice is the comprehensive planning that has ensured the compatible development of a 7,800-acre area. Also, by including pedestrian linkages between employment and residential clusters, as well as a mixture of employment and residential uses within one cluster, the plan adopts some New Urbanism concepts - e.g., concentrated development of clean mixed-uses, reduction of automobile

dependency. Another notable aspect of this practice is the public and private, as well as multi-jurisdictional, collaboration that has occurred among the cities, county, university, and private-property owners.

Still, there remain some obstacles to the continued implementation of the Oxmoor Master Plan. One, the major challenge to development continues to be the lack of infrastructure (e.g., roads, utilities). Two, infrastructure development has been market-dictated as demand for land has persuaded the public or private sector to develop the appropriate infrastructure. This could limit the development of the non-Oxmoor Industrial Park and UAB Research Park aspects of the master plan. Three, even with demand, the Metropolitan Development Board has reported that securing funding is a slow and difficult process, controlling the pace of development.

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Chronology

- 1982 City of Birmingham purchased land from U.S. Steel to develop industrial parks.
- Bruno's, Inc. and Parisian indicated their intent to relocate operation outside of downtown Birmingham.
- 1983-86 Bruno's, Inc. purchased land from Mead Paper Company that was adjacent to the city's land set aside for Oxmoor Industrial Park.
- City of Birmingham annexed the land Bruno's, Inc. acquired and included in Oxmoor Industrial Park.
- Bruno's, Inc. and Parisian (now Saks Fifth Avenue) moved their corporate headquarters and warehouse operations to Oxmoor Industrial Park.
- City of Birmingham, Metropolitan Development Board, and private property owners hired HOH Associates, Inc. to design master plan for Oxmoor Valley.
- Jefferson County and City of Birmingham created new mixed-use zoning overlay district (MXD Zone).
- 1986-1990 Metropolitan Development Board hired HOH Associates, Inc. to create development guidelines for Oxmoor.
- Oxmoor Steering Committee was created.
- Infrastructure was developed within and around Oxmoor Industrial Park.
- Southern Research Institute and Southern Research Technologies located operations in Oxmoor Valley.
- 1992 Robert Trent Jones Golf Complex at Oxmoor opened, the first of eight such complexes that compose the Robert Trent Jones Trail of Alabama.
- 1994 City of Birmingham transferred 50 acres of land to University of Alabama at Birmingham to create the UAB Research Park.
- 1997 The Office for the Advancement Industries (OADI) Technology Center (incubator) located at UAB Research Park.
- 1998 Oxmoor Village Master Plan developed.
- 1999 PCS Health Systems announced intention to locate in UAB Research Park.
- Oxmoor Industrial Park is fully occupied.